

CUSTOMER GUIDE TO THE NEW ONVIO CLIENT CENTRE

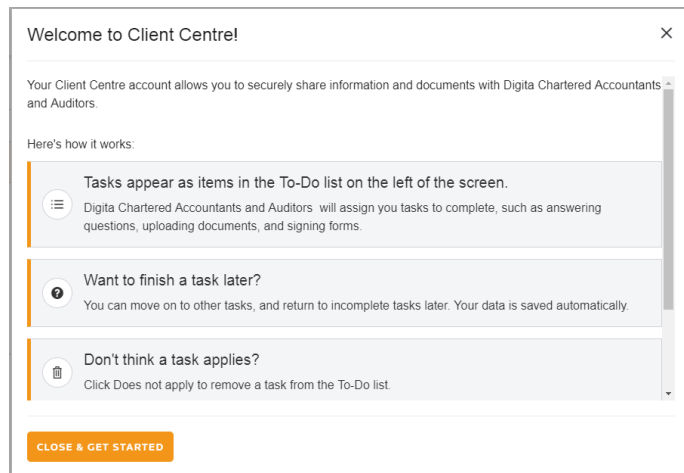
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OVERVIEW

Onvio Client Centre allows you to share documents with your Accountant and electronically (E-Sign) documents sent to you.

The first time you log into the new Client Centre you will be shown a brief overview of what is included in this new version.

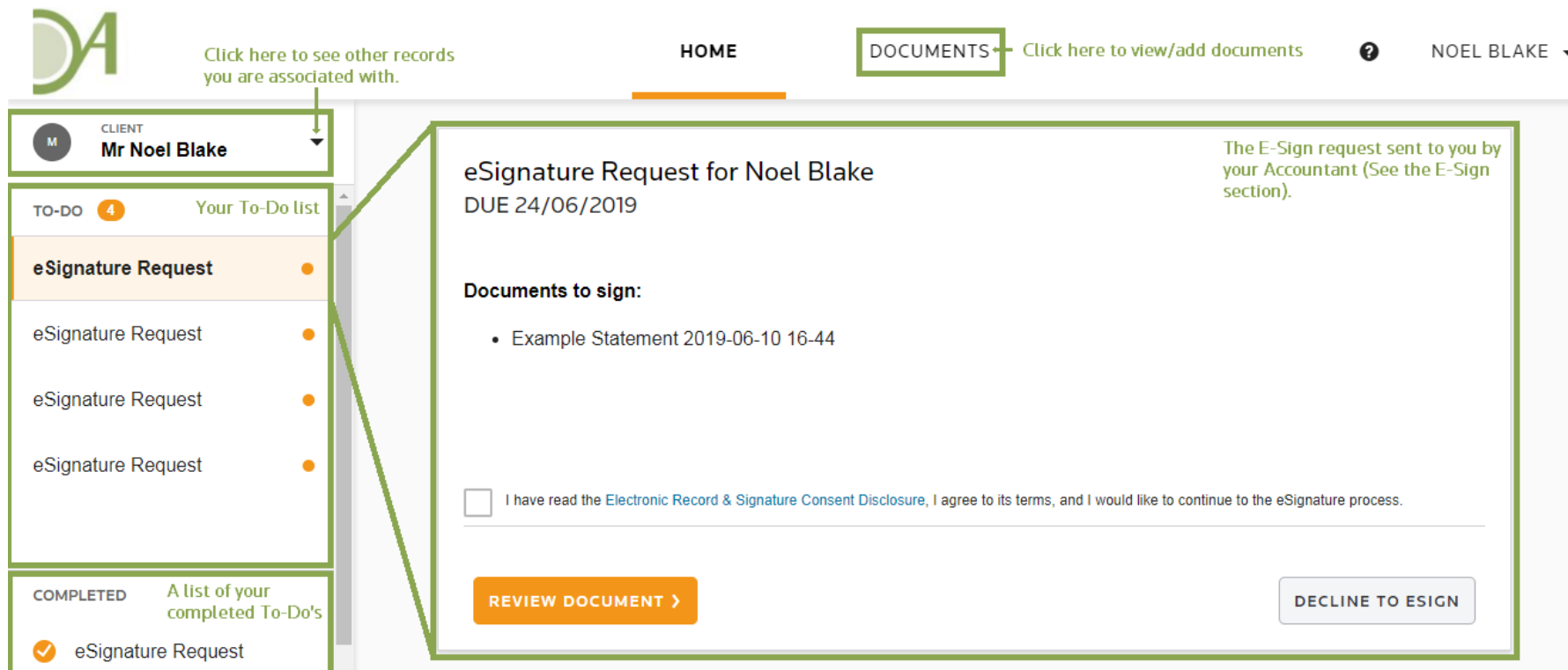


HOME SCREEN

On the left you will see that there is a list of the E-Sign requests (If they have been sent) that your accountant has sent to you and also a list of your completed E-Sign requests.

The main part of the screen will show the active E-Sign request (for instruction see the E-Sign section to see this process).

The default client that appears when an individual log's in is based on alphabetical order. e.g. Noel is a director of companies' Stoke Ltd and XYZ Ltd. When Noel logs in, the default client will always be Mr Noel Blake, if he clicks the dropdown menu he can choose Stoke Ltd and XYZ Ltd.



DA Click here to see other records you are associated with.

HOME **DOCUMENTS** Click here to view/add documents ? **NOEL BLAKE** ▼

CLIENT
M **Mr Noel Blake** ▼

TO-DO 4 **Your To-Do list**

- eSignature Request** ●
- eSignature Request ●
- eSignature Request ●
- eSignature Request ●

COMPLETED A list of your completed To-Do's

- ✓ eSignature Request

eSignature Request for Noel Blake
DUE 24/06/2019

The E-Sign request sent to you by your Accountant (See the E-Sign section).

Documents to sign:

- Example Statement 2019-06-10 16-44

I have read the [Electronic Record & Signature Consent Disclosure](#), I agree to its terms, and I would like to continue to the eSignature process.

REVIEW DOCUMENT > **DECLINE TO ESIGN**

E-SIGNING

When your Accountant sends you an E-Sign request you can use the E-signing Wizard to action this and send the signed document back to your Accountant.

Step 1.

Confirm you have read the **Electronic Record and Signature Consent Disclosure** by ticking the box and **Review Documents**, or **Decline to E-Sign**



eSignature Request for Noel Blake
DUE 24/06/2019

Documents to sign:

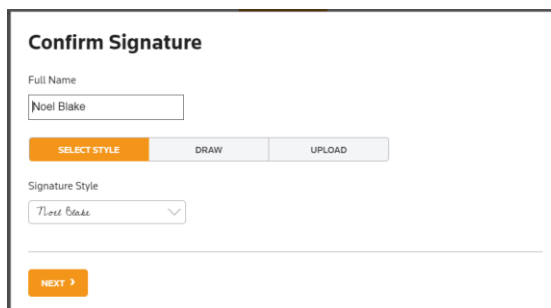
- Example Statement 2019-06-10 16-44

I have read the [Electronic Record & Signature Consent Disclosure](#), I agree to its terms, and I would like to continue to the eSignature process.

REVIEW DOCUMENT > **DECLINE TO ESIGN**

Step 2.

Confirm Signature, here you can either type, draw or upload an image of your signature which will appear on the signed document.



Confirm Signature

Full Name
Noel Blake

SELECT STYLE **DRAW** **UPLOAD**

Signature Style
Noel Blake

NEXT >

Step 3.

On this screen review and E-Sign the document

To Sign

1 Example Invoice Table 2019-...

1 Example Outstanding Balan...

This E-Sign request has 2 documents that require signature

1 **Attention Needed**

There are 1 items that need your attention on this document.

Click here to move to the first required action

START

Client Name:

Document:

The information within this document is correct and complete to the best of my knowledge and belief.

Signature:

Name:

Date:

You can scroll through the pages in the document either by using the mouse or clicking the arrows

^ Page 1 / 2 v | Q 50% Q

REVIEW ACTION-REQUIRED ITEMS 2

This shows how many other Items require signature

If you have reviewed the document and do not wish to sign click **DECLINE TO ESIGN**

DECLINE TO ESIGN

Step 4.

Confirm your signature(s)

Client Name:

Document:

1 of 1

Confirm your signature.

ent is correct and complete to the best of my

CONFIRM

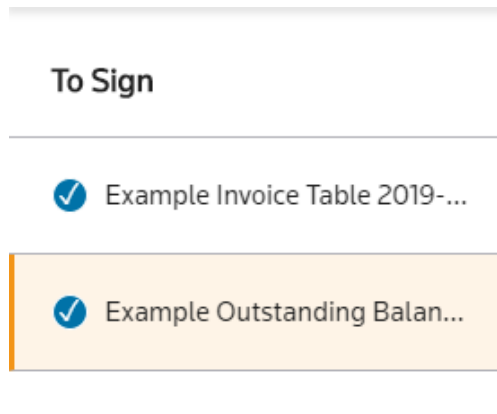
If you have multiple documents to sign you will see the following, press **Continue**.

⚠ Continue to the next document that requires attention?

CONTINUE CANCEL

Step 5.

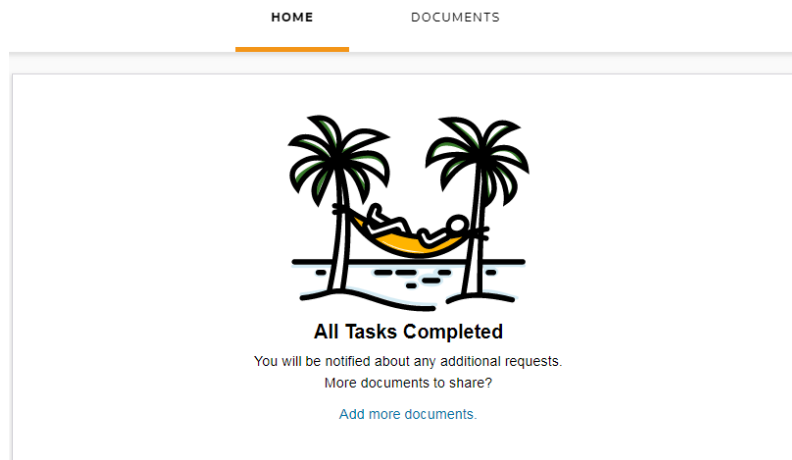
Once you have actioned all requests they will be marked with a tick, you now see **Sign & Submit** is now active press this to submit to your accountant.



SIGN & SUBMIT

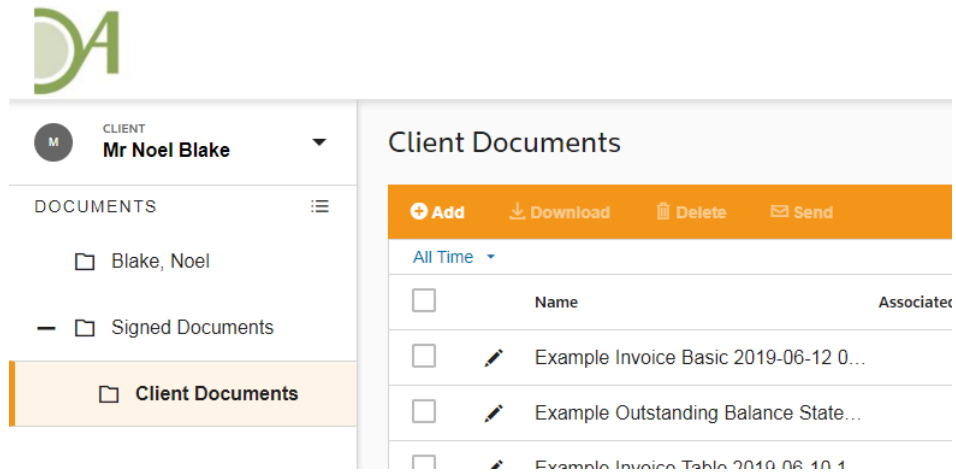
You have now successfully signed the E-Sign request, your accountant should receive notification for each request you have actioned.

Once you have gone through all your E-Sign request and you have no To-Do's you will see the following screen indicating no request are outstanding.



VIEW SIGNED DOCUMENTS

To review any documents, you have electronically signed you will need to go to the documents page where you can view the Signed Documents | Client Documents folder.

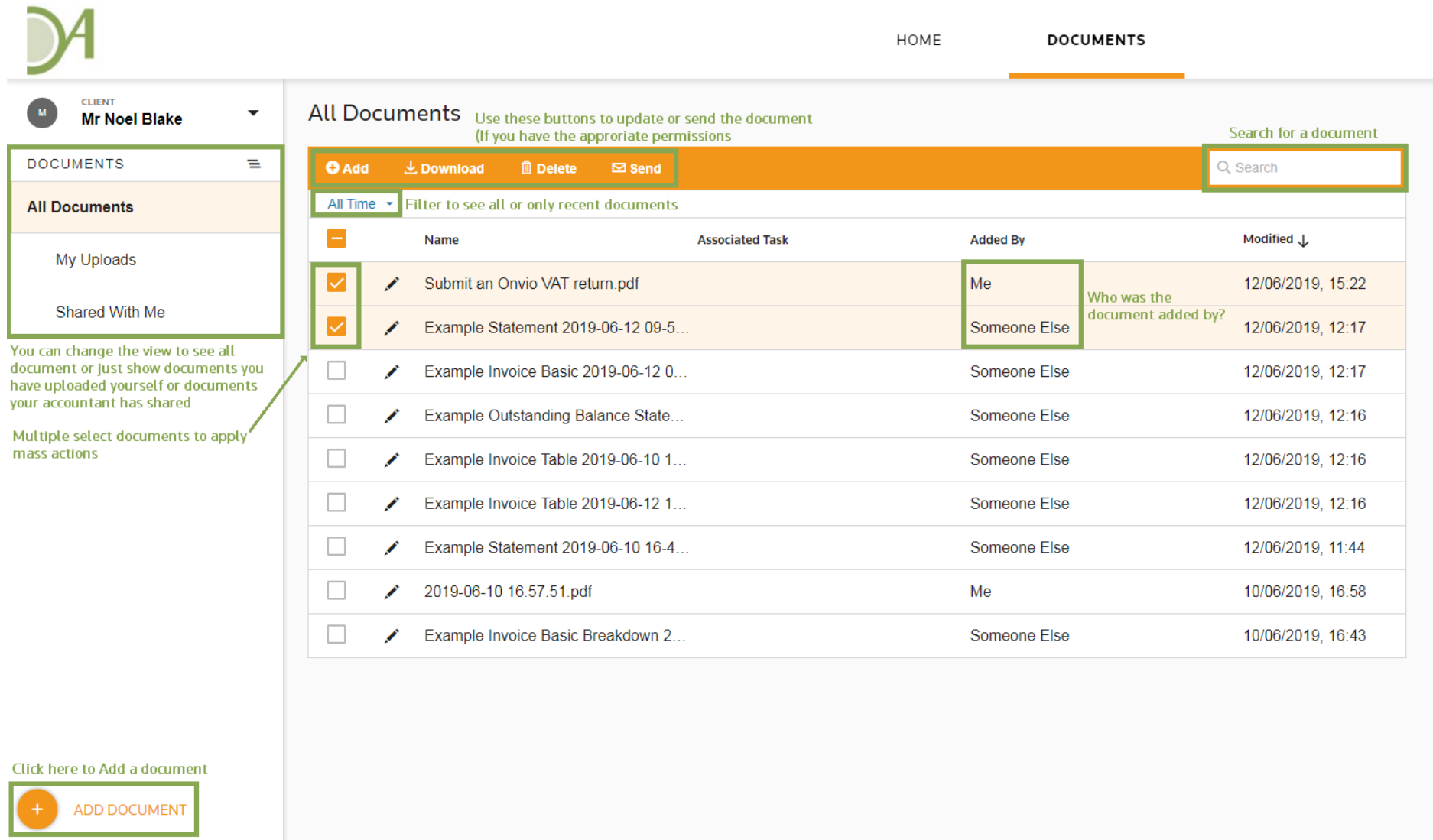


The screenshot shows the Thomson Reuters interface for viewing signed documents. On the left, there is a navigation pane with a logo at the top and a client profile for 'Mr Noel Blake'. Below the profile, there is a 'DOCUMENTS' section with a list of folders: 'Blake, Noel', 'Signed Documents', and 'Client Documents'. The 'Client Documents' folder is selected and highlighted. The main area displays the 'Client Documents' folder contents. At the top of this area, there is an orange bar with action buttons: '+ Add', 'Download', 'Delete', and 'Send'. Below this bar, there is a dropdown menu set to 'All Time'. The main content is a table with columns for 'Name' and 'Associated'. The table contains three rows of document entries, each with a checkbox, an edit icon, and a document name.

<input type="checkbox"/>	Name	Associated
<input type="checkbox"/>	Example Invoice Basic 2019-06-12 0...	
<input type="checkbox"/>	Example Outstanding Balance State...	
<input type="checkbox"/>	Example Invoice Table 2019-06-10-1	

DOCUMENTS

To access the documents section, click the tab on the Home screen, by default this view will show all the documents your accountant has shared with you.



DA HOME **DOCUMENTS**

CLIENT **Mr Noel Blake**

DOCUMENTS

- All Documents
- My Uploads
- Shared With Me

You can change the view to see all document or just show documents you have uploaded yourself or documents your accountant has shared

Multiple select documents to apply mass actions

Click here to Add a document

ADD DOCUMENT

All Documents Use these buttons to update or send the document (If you have the appropriate permissions)

Search for a document

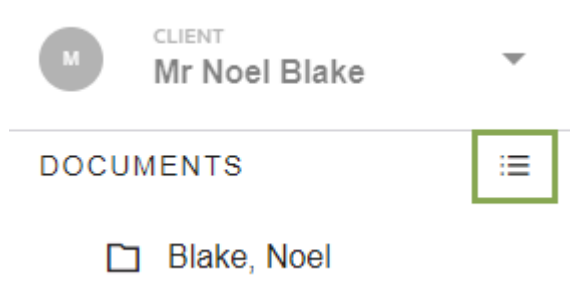
Add **Download** **Delete** **Send**

All Time Filter to see all or only recent documents

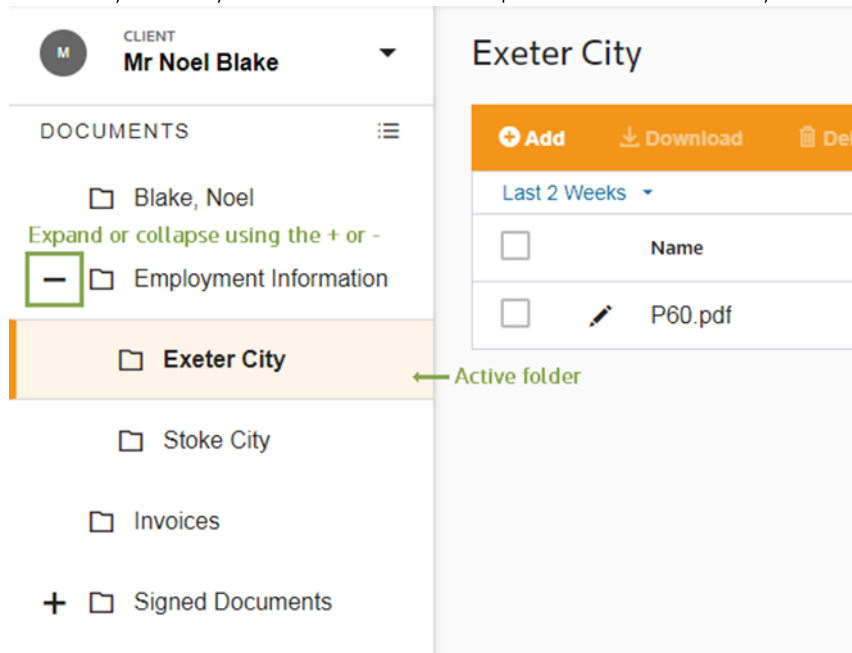
<input type="checkbox"/>	Name	Associated Task	Added By	Modified ↓
<input checked="" type="checkbox"/>	Submit an Onvio VAT return.pdf		Me	12/06/2019, 15:22
<input checked="" type="checkbox"/>	Example Statement 2019-06-12 09-5...		Someone Else	12/06/2019, 12:17
<input type="checkbox"/>	Example Invoice Basic 2019-06-12 0...		Someone Else	12/06/2019, 12:17
<input type="checkbox"/>	Example Outstanding Balance State...		Someone Else	12/06/2019, 12:16
<input type="checkbox"/>	Example Invoice Table 2019-06-10 1...		Someone Else	12/06/2019, 12:16
<input type="checkbox"/>	Example Invoice Table 2019-06-12 1...		Someone Else	12/06/2019, 12:16
<input type="checkbox"/>	Example Statement 2019-06-10 16-4...		Someone Else	12/06/2019, 11:44
<input type="checkbox"/>	2019-06-10 16.57.51.pdf		Me	10/06/2019, 16:58
<input type="checkbox"/>	Example Invoice Basic Breakdown 2...		Someone Else	10/06/2019, 16:43

Who was the document added by?

If you wish to see the Folder structure your accountant has setup click on this button.



When you view by Folder you will see Windows explorer tree view. Here you can expand folders and view the content and apply actions as above.



HELP SECTION

You can view the view the **Onvio Client Centre** Help by clicking the ? icon in the top right hand side of the screen next to your name.